

HOW TO... Use headers and footers

When your Word documents stretch to more than a couple of pages, page numbers are essential. Rod Lawton explains how to add headers and footers to your work

Page numbers help other people find their way through your documents, especially if you create a table of contents (TOCs) or an index to go with them. When you print out multipage documents, you'll need page numbers yourself to get the pages in the right order for stapling or binding.

Word can insert page numbers in one of two areas set aside on each page: the header at the top of the page, or the footer at the bottom. These are horizontal strips placed unobtrusively so they won't be noticed if you don't use them. Any items inserted in either place will appear on every page in the document.

Headers and footers aren't just used for page numbers, though. They can also be used to show the document's title, a logo, the date it was created and more besides. Here we show you how to incorporate both into your Word document, and how to get the most from them.

We've used Word 2003, but this walkthrough will also work in Word 2000. Word 2007 has the same tools and options in principle, but applies them in a different way. We'll cover this in next month's issue.

1 We're starting with a document that has been formatted, but has no header or footer content. To display and edit the header and footer areas, you need to go to the View menu and select Header and Footer. You also need to be in Print Layout mode throughout

this tutorial in order to work with headers and footers. Select this on the View menu.

In Header and Footer mode, the main text is dimmed to show that it's not editable. At the same time the header area at the top of the page, marked out with a dotted line, becomes active and the Header and Footer toolbar is displayed. This has various buttons for inserting and modifying header and footer content, which we'll come to shortly.

2 We are going to try inserting the page number in the first page's footer. Scroll down through the document until the first footer becomes visible and click within it. Then click on the button that is second from the left on the Header and Footer toolbar. This is the Insert Page Number button. It places a field in the footer, which will display the current page number.

There are other page numbering tools, too. To the right of the Insert Page Number button is the Insert Number of Pages button, which inserts the total number of pages in the document. Our example document has only one page.

3 Autotext items can be used in conjunction with regular text. For example, type Page in the Footer field, then click on the Insert Page Number button. Your footer should now read Page 1. Add 'of' to this, so that it reads 'Page 1 of', and then click on the Insert Number of Pages button. The result would read (for example)

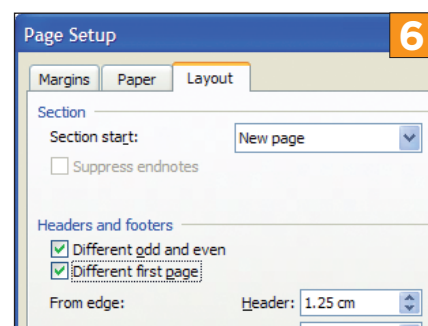
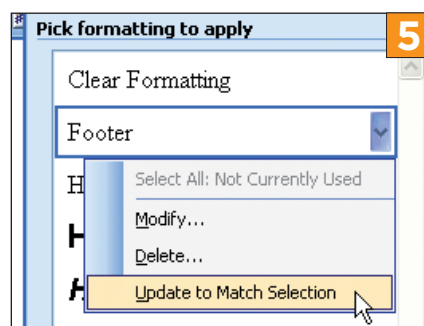
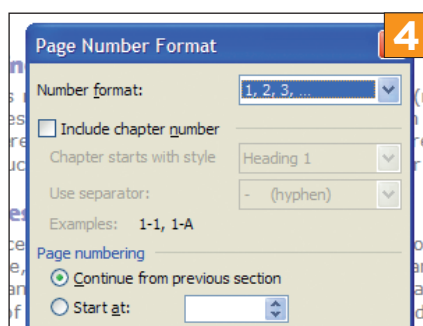
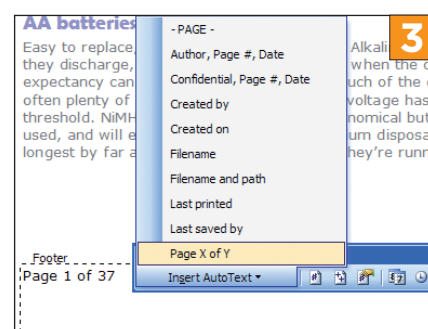
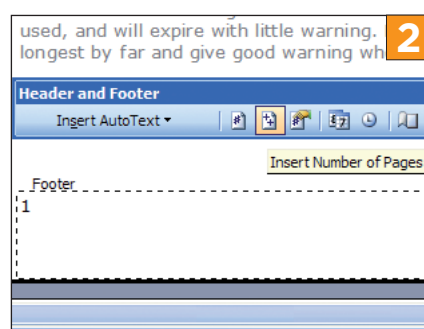
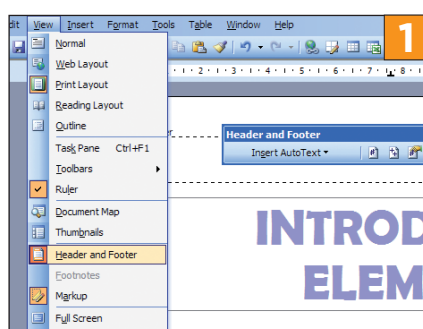
'Page 3 of 32'. As always with Word, there's a faster way to do this. Click on Insert Autotext and select the last item in the drop-down menu, which is Page X of Y.

4 By default, conventional Arabic numbering is used for page numbering. To change this, click on the Format Page Number button and then on the Number Format drop-down menu to swap to Roman or alphabetic characters.

At the bottom of the dialog are the Page numbering settings. These are important if your document has more than one section, or if the page numbers follow on sequentially from a separate document. When a document is split into sections, each can be numbered independently. To make the numbering continuous, select Continue from previous section. If you need the page numbering to start from any number other than 1, select 'Start at' and type the number into the box alongside.

5 Header and footer content can be styled and formatted just like other text. In fact, each has a specific text style that can be altered. Here, for example, we have changed the font and the font size. To do this, open the Styles and Formatting pane, select the Footer styles context menu and choose Update to Match Selection.

If you select the text and then open the Border pop-up on Word's toolbar, you can set a Bottom Border for header text and a Top Border



for footer text. This produces a horizontal line, which visually separates the header and footer text from the document's main content. Borders form part of text styles, too.

Horizontal text alignment works slightly differently in headers and footers. Text is left-aligned by default, but if you place the cursor before the text and press Tab, the text is centred. If you press Tab again, it is right-aligned. You may need to move the tab markers on the ruler to get the alignment spot on if you have changed the page margins.

6 There are other formatting options to consider, but across the whole document rather than within individual headers and footers. If your document will be printed on both sides of the sheet, it will have facing left and right pages or, as Word terms them, odd (right-hand) and even (left-hand) pages. In these cases, headers and footers are usually mirrored, and it's the convention to have page numbers on the outside of the page – in other words, left-aligned on even (left-hand) pages and right-aligned on odd (right-hand) pages. Word can't automatically align header and footer content according to whether it's on odd or even pages. What it can do is offer separate headers and footers for each.

To set this up, click on the Page Setup button on the Header and Footer toolbar. Go to the Layout tab. Then select 'Different odd and even' in the Headers and footers section. Directly below this is another box labelled 'Different first page', which you'll also need to select. This is because it's a convention to use page headers to display the document title, and you won't want this on the first page, since this page probably contains the document's title.

7 If you do want to set up your document with odd/even pages and a different first page, do it at an early stage so you can play with your header and footer layouts accordingly. As

DID YOU KNOW?
Tables of contents (TOCs) can be generated automatically from the headings used in the text, so make sure you standardise them. TOCs list the page numbers automatically

before, headers and footers are edited directly on the page. Now, though, they are marked Odd and Even. The first page also has a First Page Header and First Page Footer. The First Page Header can be left blank because the first page has the title anyway. In the Even Page Header on the second page, enter the document title.

8 On the opposite (odd) page, we're using a graphic instead of the document's title to add a little visual variation. It's the same image that is used on the main title page, but scaled down. If you copy a graphic into a header, it will be inserted as an 'inline' graphic. This means it takes up a single line of text. As it is higher than the text on that line, it creates a lot of space. We want it to float independently. To do this, we first select the graphic. On the Picture toolbar, click on the Text Wrapping button (fourth from the right) and choose Square. The graphic can overhang the borders of the header area. However, it is still treated as part of the header.

9 The use of separate odd and even headers and footers means that you've got twice the space for adding content. For example, we have put the document title in the left (even) header and a graphic in the right (odd) header. Content in the footers can be varied, too. Try inserting the page numbers left-aligned for the even pages and right-aligned for the odd. In the left footer, add some more information about this particular version of the document, such as when it was created. This is especially useful while a document is still being authored, because it helps various contributors to keep track of the different versions. In the Autotext menu, select Created on. This inserts both the date and the time when the document was created.

10 Word handles the positioning of headers and footers automatically. Eventually, though, you will want to control the positioning

more precisely. With headers, the top margin you set in the Page Setup dialog box defines the space available for the header, which sits in the gap created by the margin. Here, the margin is set to 3cm. Change this, and you'll see that the header zone height is increased or reduced.

11 Another way to define the space available for both headers and footers is to use the vertical ruler on the left side of the window. For example, if you drag the lower header area marker downwards, this increases the Top margin, which is the value shown in the Page Setup dialog.

This has more significance with the footers. One of the problems you may face is keeping the page content clear of the footer content. With footers, the Bottom margin (in the Page Setup dialog box) works with of the footer's upper margin. In our example, we've set the Bottom page margin to 3cm. Whatever happens, the text will never go lower on the page than that. You can now move the footer's top margin up and down within that space to control the gap between the footer and the content. If you move it up too far, the footer will push the page content upwards and out of the way, but with very little gap.

12 Finally, check the header and footer layout by clicking on the Zoom menu on the toolbar. Select the Two Pages option. Now it's possible to view your document's odd and even pages side by side, so that you can check that the odd and even footers are correct and that the first page has no header. Word is not quite clever enough to understand that, in publishing, documents always start on a right (odd) page. Instead, it displays them out of step, putting odd pages on the left and even pages on the right. You will need to bear this in mind when you are checking your layouts.

When you have finished making changes to headers and footers, click on the Close button at the far right of the Header and Footer toolbar to return to normal editing mode. 

